FOXSTREAM PROFESSIONAL TAX SERVICE

Individual Tax Prep Checklist

Use this checklist to gather what you need before filing your Form 1040. Bring originals or clear digital copies.

Personal information

- Government-issued photo ID for you and spouse
- Social Security or ITIN numbers for everyone on the return
- Last year's federal and state tax returns
- Bank routing and account numbers for direct deposit

Income documents

- W-2 from each employer
- 1099-NEC / 1099-MISC for contract work
- 1099-INT, 1099-DIV, 1099-B for interest, dividends, brokerage activity
- 1099-R for retirement distributions; SSA-1099 for Social Security
- 1099-G for unemployment or state refunds
- K-1s from partnerships, S-corps, or trusts

Deductions and credits

- Mortgage interest (Form 1098) and property tax statements
- Charitable contribution receipts (cash and non-cash)
- Medical expenses if itemizing
- Childcare provider name, address, EIN, and amounts paid
- Form 1098-T and 1098-E for education expenses and student loan interest
- IRA / HSA contribution records

Self-employment (if applicable)

- Total gross receipts and 1099-Ks
- Categorized expense totals (vehicle, supplies, software, etc.)
- Mileage log with business / personal split
- Home-office square footage and home expense totals